

PENPOWER WorldCard User Manual

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Contents

Chapter 1 Product Introduction.....	3-4
1.1 WorldCard Ultra plus.....	3
1.2 Product Feature.....	3-4
Chapter 2 Getting Started.....	4-7
2.1 System Requirements.....	4
2.2 Installing Penpower WorldCard.....	4
2.2.1 Software and Driver Installation.....	4-6
2.2.2 Connecting Hardware.....	6
2.3 Preparation for Card Scanning.....	6-7
Chapter 3 Overview.....	8-10
3.1 User Interface.....	8
3.1.1 Toolbar.....	9
3.2 Scan Business Cards.....	9
3.2.1 Scan wizard.....	9-10
Chapter 4 Edit Cards.....	10-11
4.1 Edit Contacts.....	10
4.2 Rescanning Card.....	11
4.3 Exchanging Front and Back Side Card Image.....	11
Chapter 5 Manage Business Cards.....	11-22
5.1 Categorize Cards.....	11
5.1.1 Categorize from Management Page.....	11
5.1.2 Categorize from Editing Page.....	12
5.1.3 Send Email by Category.....	12
5.2 Search Contacts.....	12
5.2.1 Text Search.....	12-13
5.2.2 Advanced Search.....	13-14
5.2.3 Finding Duplicate Data.....	14
5.3 Exchange Contacts.....	15
5.3.1 Export.....	15-17
5.3.2 Import.....	17-19
5.3.3 Sync.....	19-20
5.4 Settings.....	21
5.4.1 Export Option.....	21
5.4.3 Field Display.....	21-22
5.4.5 Scan Option.....	22

Chapter 1 Product Introduction

Penpower WorldCard provides a total business card management solution by integrating card recognition, management, and printing functions in a single digitizing unit to find your business cards at any given time.

1.1.2 WorldCard Ultra plus

Inherit the design concept of WorldCard Ultra, **WorldCard Ultra plus** help you scan business card in the easiest way that you have never experienced.

Tips

- **Insert a Business Card Here:** Insert a card with the information side facing up.
- **Intuitive LED indicator:** The LED indicator will blink when a card is inserted. It will blink faster during scanning.



Specification

- Dimensions: 107x99x28mm
- Weight: 168g
- Resolution: 600 dpi
- Interface: USB
- Image: Color

1.2 Product Feature

• **Easy Card Reader**

Scanning or capturing your business cards has never been quicker or easier.

• **Organize Business Cards**

After scanning or capturing your business cards, WorldCard software can organize, sort, search, add and delete any entries. Also, you can easily edit and add notes to any business card.

• **Advanced Search**

Full text search to find your contacts easily and conveniently.

• **Support multiple languages**

Recognize business cards in different languages, including English, French, German, Italian, Dutch, Swedish, Norwegian, Danish, Finnish, Russian, Polish, Turkish, Hungarian, Spanish(Spain and Mexico) Portuguese(Portugal and Brazil), Greek, Czech, Slovak, Traditional Chinese, Simplified Chinese, Japanese, Korean and many more to come.

- **Multiple Categories and Sub-Categories**

Organize card information into categories and sub-categories in anyway you want.

- **Print Templates**

WorldCard provides various print templates. You can also easily create your own templates and print contact information in different formats.

- **Data Exchange**

Support synchronization/importing/exporting for Outlook, Outlook Express, Lotus Notes, Palm, Windows Mobile, ACT! by Sage, Goldmine, Salesforce, PIM software, and World-Card series, such as WorldCard Mac, or WorldCard Mobile versions (WorldCard Mobile and WorldCard Contacs).

Chapter 2 Getting Started

2.1 System Requirements

- Pentium III 800 CPU or above
- 512MB of RAM
- 500MB of available hard disk space
- Windows 7/Vista /XP
- USB Port

2.2 Installing Penpower WorldCard

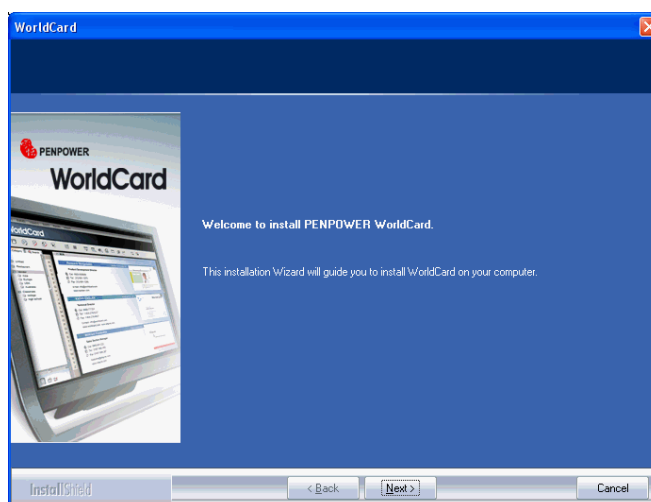
To properly use your WorldCard

1. Install the software included in the CD.
2. Connect your WorldCard scanner to your PC.
3. Scan or capture your business cards.

2.2.1 Software and Driver Installation

To start, insert the CD into your CD/DVD ROM (if the installation program does not start automatically, please double-click the setup.exe file on the CD).

1. Click **Next**.



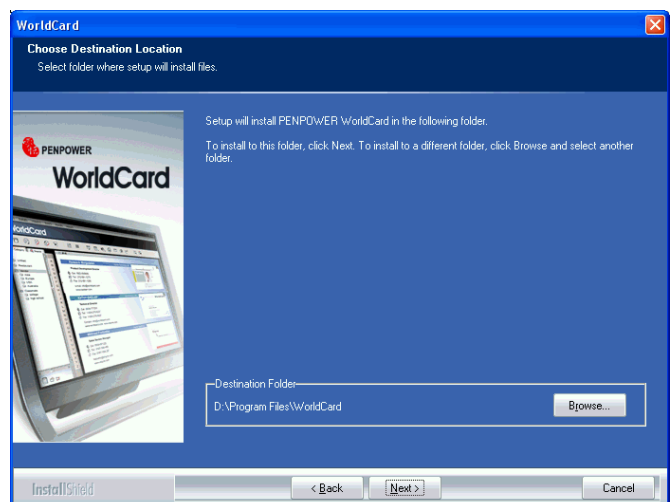
2. Select **I accept the terms of the license agreement** to accept the license agreement. Please read the license agreement completely.



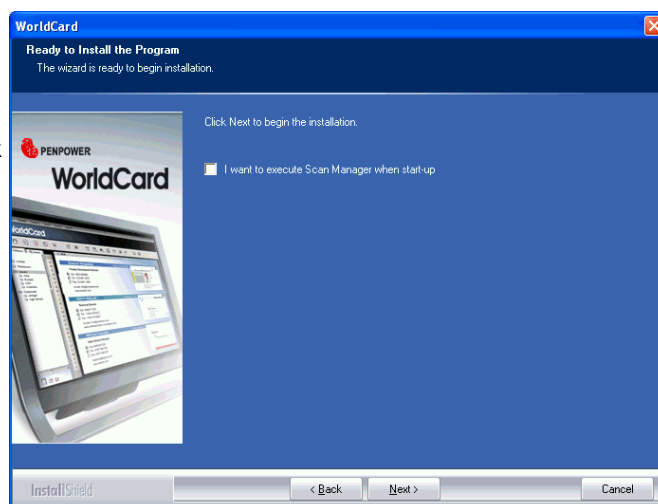
3. Please follow the instructions in the onscreen notice. Click **Next** to continue.



4. Please select the location to install the program.
The default location is c:\Program Files\WorldCard.
Click **Next** to continue.



5. If you want to run the Scan Manager when starting up the computer for quick scanning into Outlook, Outlook Express, Windows Contacts or ACT! directly, click **I want to execute Scan Manager when start-up**, and then click **Next** to continue.



6. Click **Yes, I want to restart my computer now**.
Click **Finish** to complete installation.



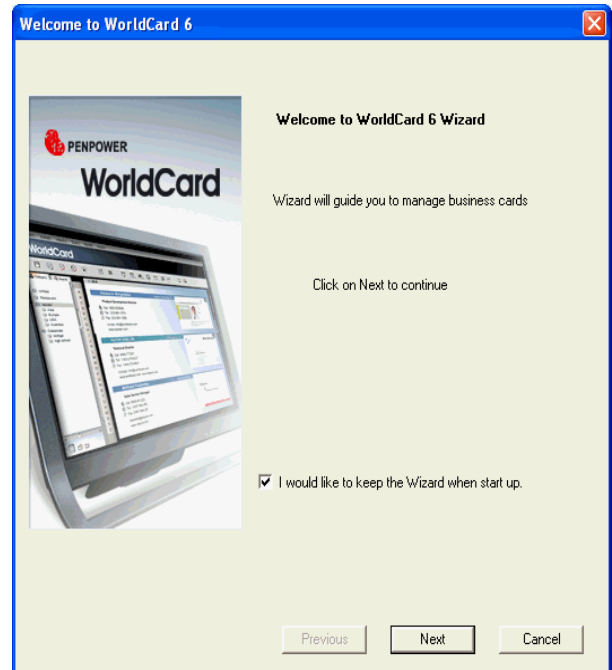
2.2.2 Connecting Hardware

After installing the software, connect the USB connection of your WorldCard scanner or business card camera to the USB port of your computer.

2.3 Preparation for Card Scanning

Start your WorldCard application by double-clicking the WorldCard shortcut on your desktop. After the WorldCard application starts, the following screen will appear.

1. To start the wizard, click **Next**.



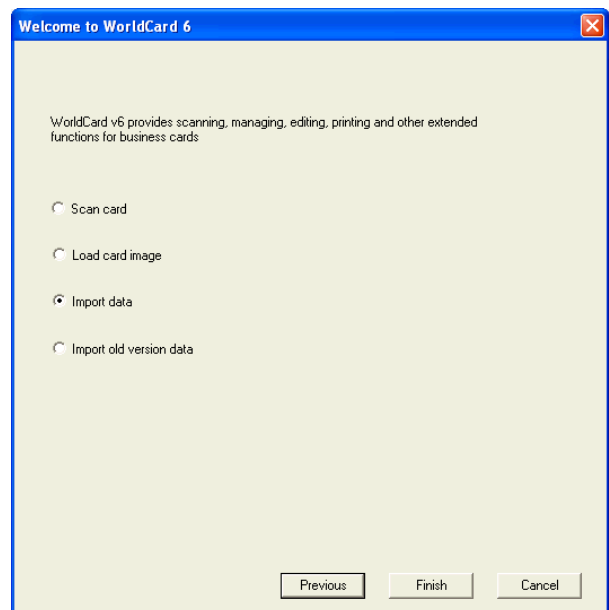
2. The Wizard can help you quickly choose what you want to do:

Scan Card: Add a card to your file.

Load Card Image: Take an existing picture of a business card and add it to your file.

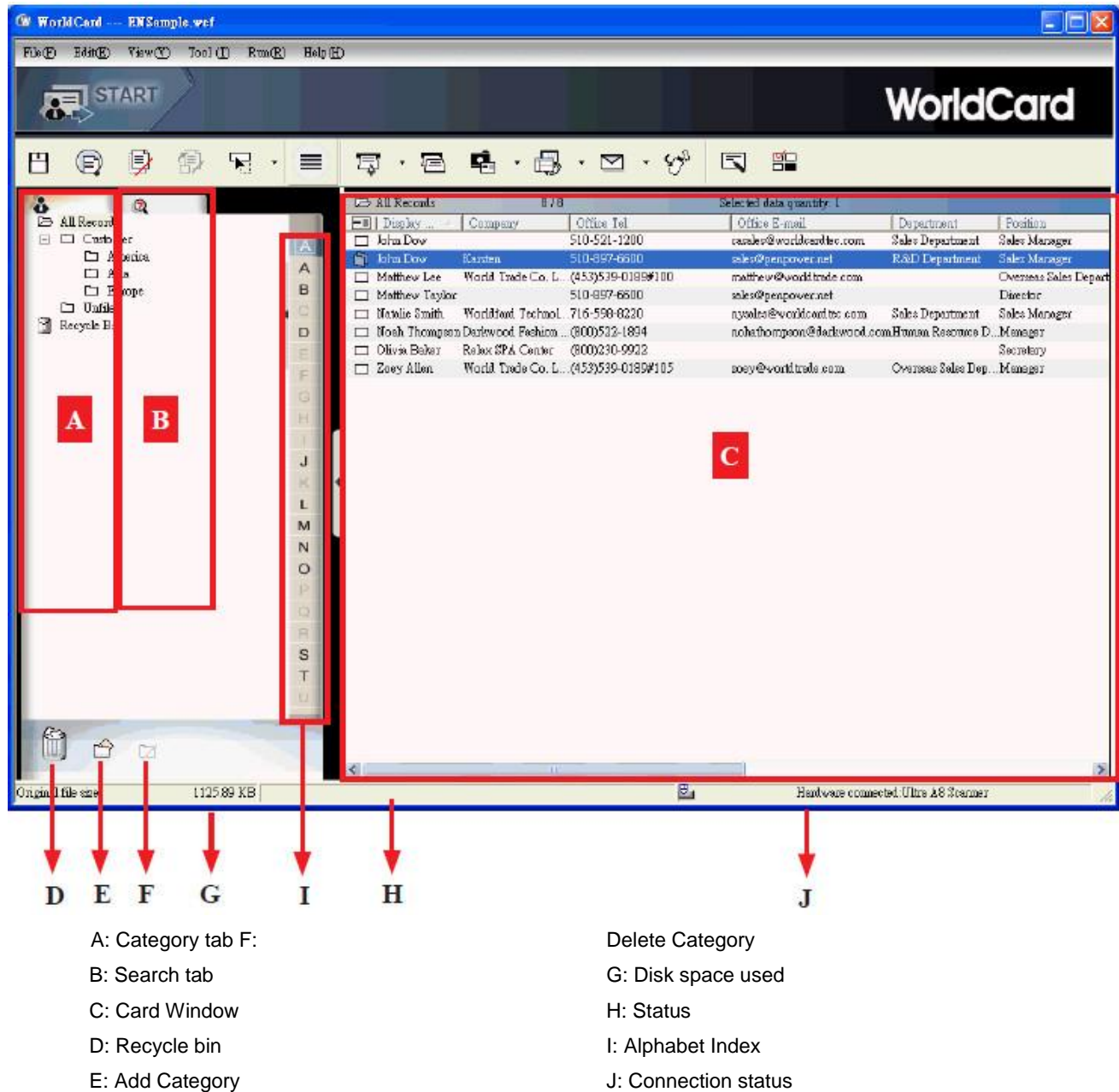
Import data: Import data from sources such as Lotus Notes, Microsoft Outlook and Outlook Express, PocketPC, Palm, ACT! by Sage, Goldmine, Salesforce, and WorldCard series, such as WorldCard windows versions, WorldCard Mobile versions (WorldCard Mobile and WorldCard Contacts).

Import Old Version Data: Import the previous WorldCard file formats into your new WorldCard File. You can select a command and click **Finish** to continue.

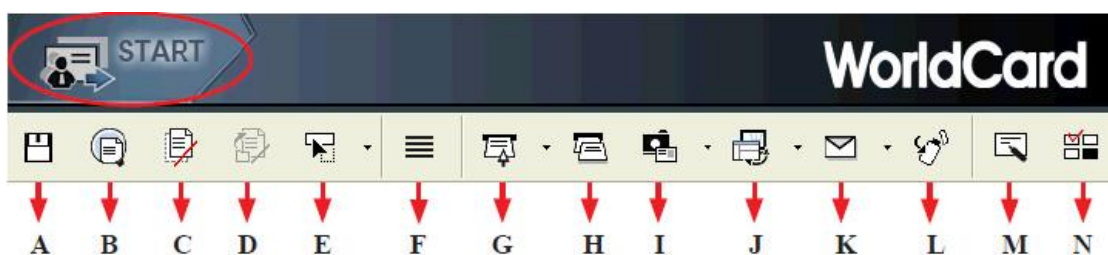


Chapter 3 Overview

3.1 User Interface



3.1.1 Toolbar



A: Save Your Card File

B: Print Preview

C: Delete Card

D: Delete Card from Category

E: Settings

F: Mode Button

G: Scan a New Business Card

H: Scan Multiple Business Cards

I: Add a New Card from Another Picture Source

J: Synchronize with Outlook/PDA/Palm/Lotusnotes

K: Send Email

L: Export All Your Data and the Portable Software to the Selected Flash Disk or Hard Drive

M: Edit Card

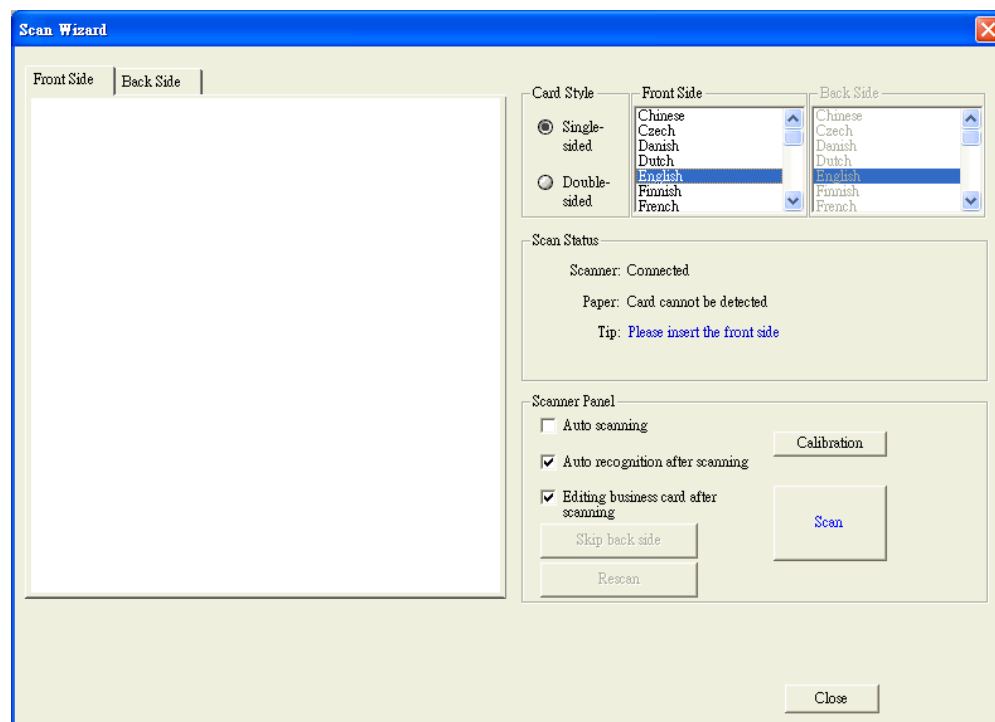
N: Edit Print Template

3.2 Scan Business Cards

To scan your business card, insert the card into your WorldCard Scanner. The scanner scans the card immediately. The recognition result saves to the system.

3.2.1 Scan Wizard

To scan business cards, select **Scan**  to launch Scan Wizard.



1. Under **Card Style**, select **Single-sided** or **Double-sided**.
2. Select the language of the card. If the card is double-sided, please select the language of the both sides.
3. Insert the card into your WorldCard Scanner and insert the card. Then the **Scanner status** area should say Ready.
4. In the Scanner Panel area, please select:
 - **Auto scanning** if you want the scan to automatically start when the card is inserted.
 - **Auto recognition after scanning** if you want the card information to be automatically added to your file. If you want to preview the scanned card image before recognition, do not select this. If you select **Double-sided**, you can click **Skip back side** to scan the front side only.
 - **Editing business card after scanning** to display the **Edit** window when closing the **Scan Wizard**.
5. After you recognize the card, the information will automatically go into the Unfiled category.

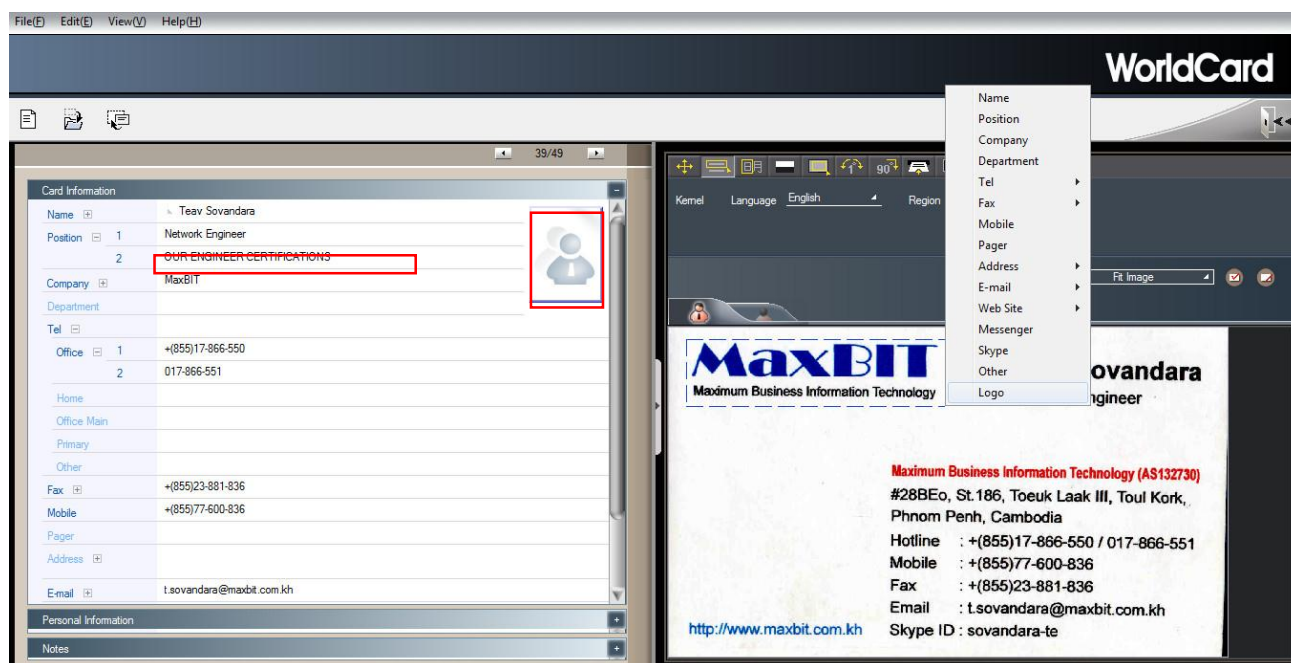
Chapter 4 Edit Cards

4.1 Edit Contacts



We can edit Name Card if we see some information wrong. We can delete incorrect information, or we can change information.

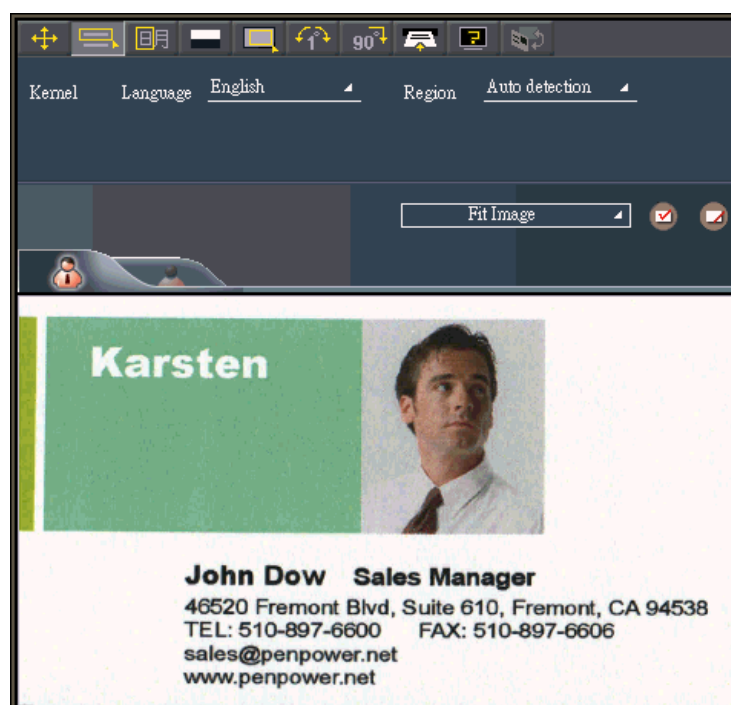
Ex: select on your logo → choose logo.

Position is incorrect, so we can delete it.




4.2 Rescanning Card

If a card is scanned inappropriately, you may use the **Rescanning** command of the WorldCard editor by clicking the **Rescanning** button . After clicking the **Rescanning** button, the following menu appears. You can select the appropriate languages from the pulldown menus. After you have selected the appropriate language settings, you can click the **Scan**  icon to rescan the business card. The card must then be inserted into the WorldCard scanner as appropriate for the orientation of the languages selected.



4.3 Exchanging Front and Back Side Card Image

Click  to exchange the front side and back side images of the business card.

Chapter 5 Manage Business Cards

5.1 Categorize Cards


The WorldCard software allows you to manage your business cards by storing them in the category groups. After installing your WorldCard software, you will find two default categories on the management page: the **All Records** category and **Unfiled** category. You can add as many user-specified categories and sub-categories as you choose to manage your business cards.

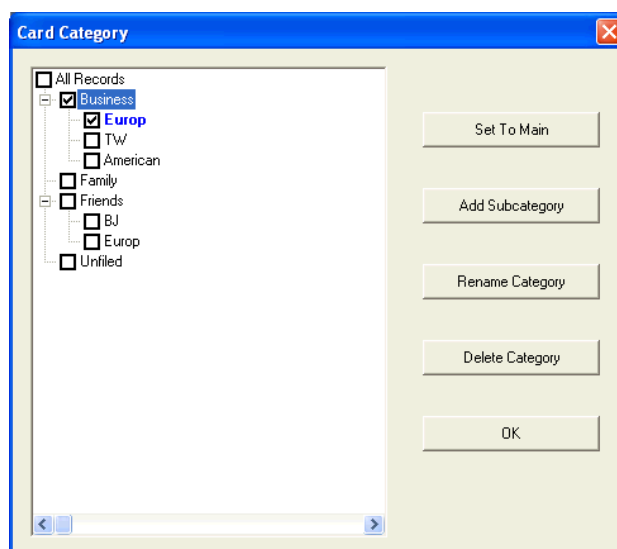
5.1.1 Categorize from Management Page

Each card, in addition to being categorized by last name, can also be categorized with our own individual settings so that you can efficiently manage numerous cards in your WorldCard database. From the WorldCard **Management** pane, highlight the card information you want to categorize, drag it directly into a specific category type under the **Category** list on the left side of the management window.



5.1.2 Categorize from Editing Page

WorldCard allows you to categorize a business card directly from the **Editing** pane. To categorize a card from the editing page, click on the **Set Category**  button. The **Card Category** dialog box appears. Select the category and then click **OK**. You may also add a subcategory from this window by clicking the **Subcategory** button.



5.1.3 Send Email by Category

To send email to a category group, select the appropriate category group from the management page. Once selected, the category will appear in the right pane of the **Management** window.

To send email to the group, click the **Email** button . WordCard will add the email addresses of the group members into your default email software. Also the **Email editing** window will then open with the appropriate contact list.


5.2 Search Contacts

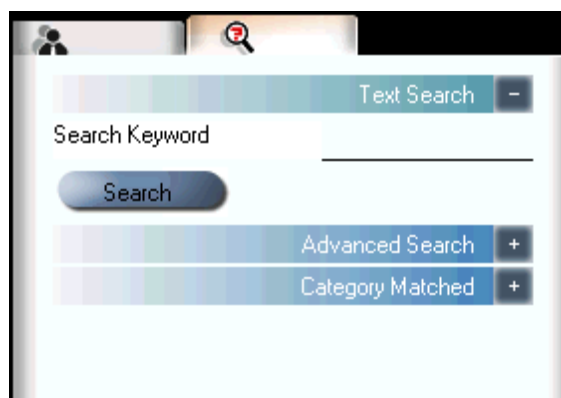
You can quickly and efficiently find your contacts with WorldCard **Search** features.

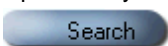
5.2.1 Text Search

The **Text Search** command of the WorldCard software allows you to quickly find a specific contact. To use **Text Search** in the WorldCard **Management** window, on the **View** menu point to **Search**, and click **Text Search**.

The **Text Search** pane appears as follows:

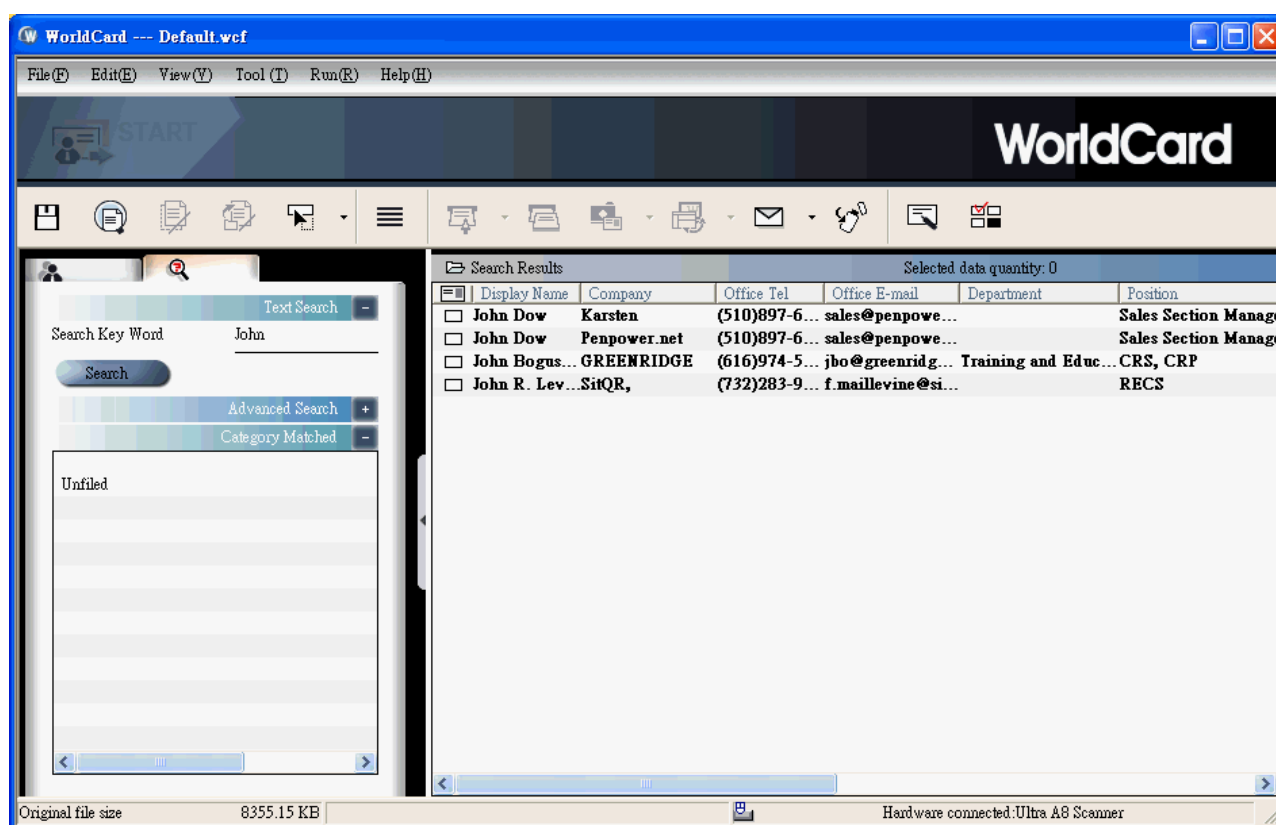
Tip: You may enter the Text Search window directly from the WorldCard Management window by clicking the Search button  .



In the **Text Search** pane, enter a key word or a group of key words separated by a blank space in the **Search** box and click the **Search** button  . The **Search** pane will update, displaying the results as in the following picture.

In the left pane, there is a list of all categories where the data from your search string was found. The right pane shows the search results that display all of the applicable fields for the cards stored in your WorldCard database.

You can double-click on any record displayed in the **Search Results** pane to open the card in the **Editing** window.



5.2.2 Advanced Search

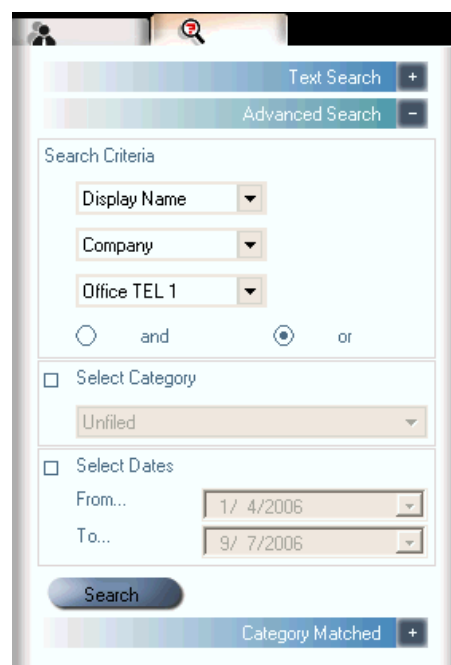
WorldCard also offers an advanced search function. To use the advanced Search function, on the **View** menu, point to **Search** and click **Advanced Search**.

The **Advanced Search** pane will open and appear as right.

Tip: You may also open the Advanced Search pane from the WorldCard Management window by clicking the Search button

When the Text Search pane appears, click

on the Advanced Search button



In the **Advanced Search** pane, you can enter your search criteria by category. You may select from categories in any one of three option windows. If you have several cards with similar criteria in your database, you may narrow your search further by using more than one of the **Search Criteria** menus.

After a **Category** for your **Advanced Search** is selected from one or all three **Category** options, you may enter an appropriate search string in the text field of each **Category**. A completed search will appear.

Please also note that the **Search Criteria** options include the **AND** operator ☐ and and the **OR** operator ☒ or . You may use these operators to further define your Advanced Search. The **AND** operator defines that your search results contain the criteria listed in all three search fields. Using the **OR** operator, a valid result must only match one of any of the three fields to be a valid result.

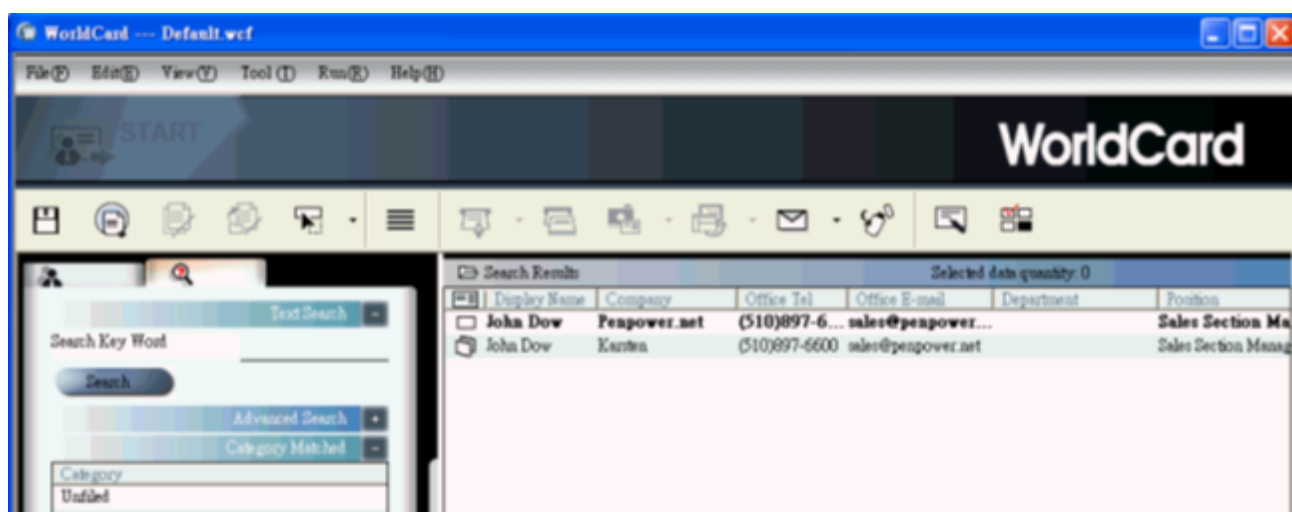
You can further define your **Advance Search Criteria** by using a specified **Category**. To select a specific category, select **Select Categ** ☒ [Select Category](#) and specify a category. You may also define your **Advanced Search** by calendar dates. To define a period for an **Advanced Search** by **Dates**, select **Select Dates** icon ☒ [Select Dates](#) and make date selection available.

After selecting search by date, you may use the **From** and **To** date options to specify a period for your search criteria. The **From** and **To** options appear as in the right picture.

5.2.3 Finding Duplicate Data

Over a period of time, you may find that you have received a business card from the same individual on more than one occasion.

WorldCard has a built-in feature for finding duplicate data. To use **Finding Duplicate Data**, click **Run** on the **Main Menu** and then **Duplicates Data**. A progress meter briefly displays in the middle of the **Management** window showing the progress of the search. After all records have been scanned, the **Search Results** pane displays the same display name entries as shown.



5.3 Exchange Contacts

WorldCard software allows you to exchange valuable contact information with other applications through the use of the **Import**, **Export** and **Synchronize** commands.

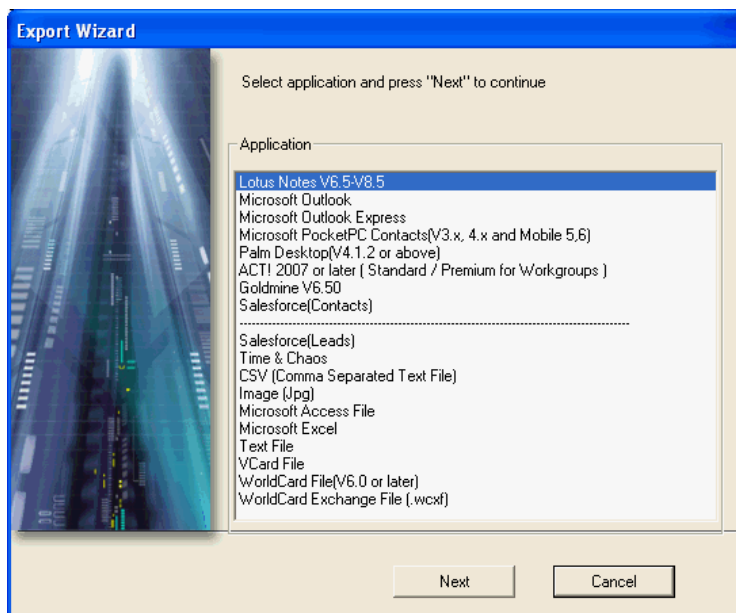
5.3.1 Export

To select export fields, you may refer to **5.10.1 Export Option** for a detailed explanation.

1. To export your **WorldCard** database to another application such as Microsoft Excel, Access, Outlook, Outlook Express, Lotus Notes, PocketPC, Palm, ACT!, Goldmine, Salesforce(Contacts), Salesforce(Leads), CSV, VCard, or WorldCard series, such as WorldCard windows versions, WorldCard Mobile versions (WorldCard Mobile for iPhone and WorldCard Contacs for iPhone), on the **File** menu click **Export**. This will open the **WorldCard Export Wizard** screen and the following dialog box appears. For the supported software, please refer **5.9.4 WorldCard Data Exchange Compatibility List**. Select the type of application for the file type that you want to create.

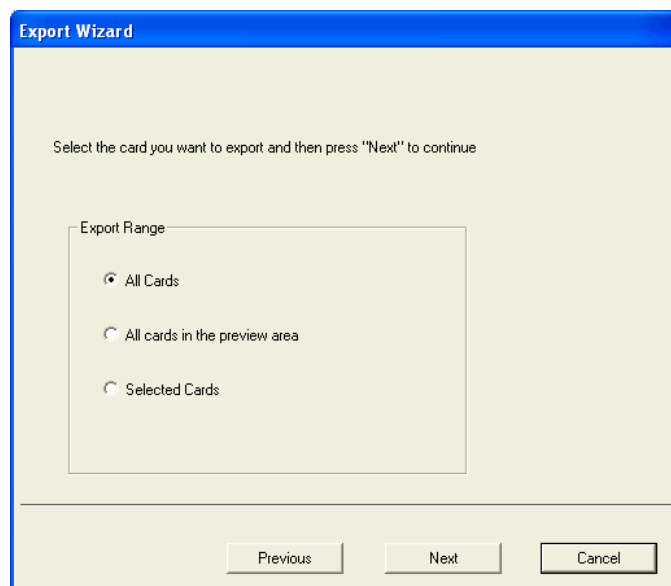
Tips:

1. *Export Text File allows you to export all fields.*
2. *Export function supports on Excel 97, Outlook 97 and Outlook Express 4.0 version and higher.*
3. *Export Wizard will compress the file . It makes your filing and mailing easier by producing a smaller file.*

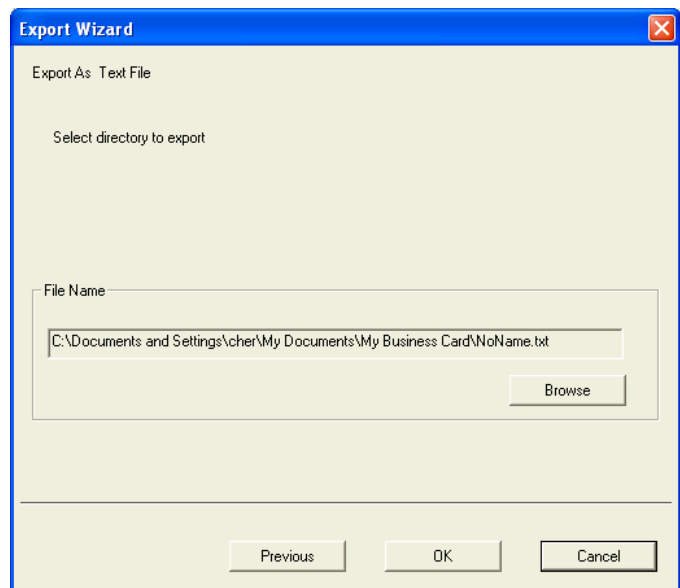


2. Click **Next**. The next **Export Wizard** dialog box displays.

3. Follow the instructions given in the **Export Wizard** dialog box to select which cards you want to export. And then click **Next**.

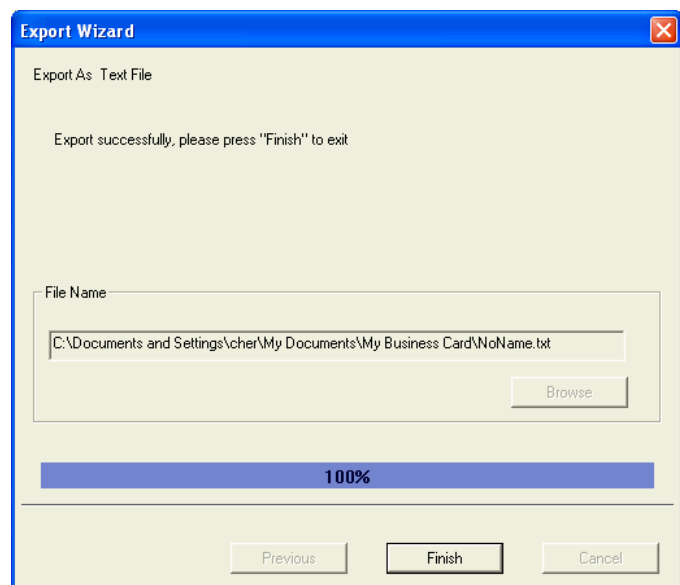


4. If you have chosen to continue with the **Export** function, choose the directory to export the files to. Click **OK** to export the cards. To complete exporting the files, review the information displayed in the **Export Wizard** window.



5. After exporting is completed, click **Finish** to close the **Export Wizard** dialog box.

6. The **Export Wizard** operations for exporting your WorldCard database to all application types are similar and will not be discussed individually in this manual. However, a brief overview of the Export of a card to Microsoft Outlook will be presented.



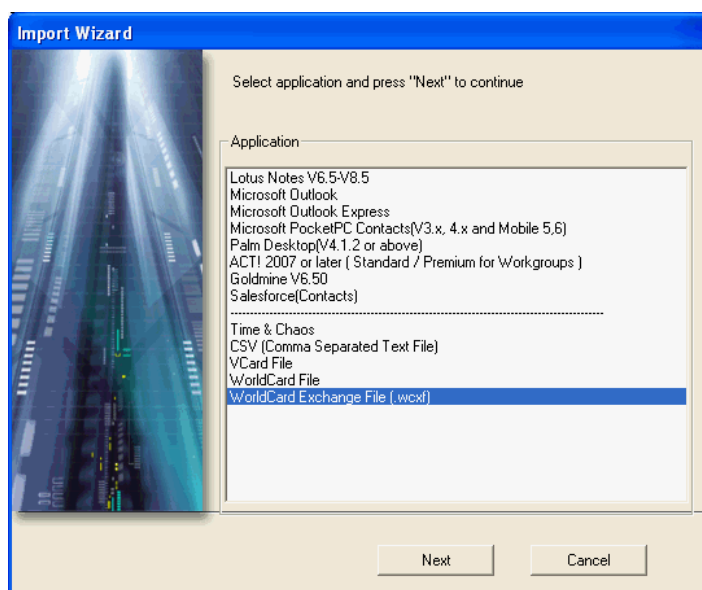
WorldCard Export

Item	Windows XP	Windows 7/ Vista 32	Windows 7/ Vista 64
Lotus Notes v6.5-v8.5	v	v	v
Microsoft Outlook	v	v	v
Microsoft Outlook Express	v		
Microsoft Pocket PC Contacts (v3.x, v4.x and Mobile 5, 6)	v	v	
Palm Desktop v4.1.2 or later	v	v	v
Salesforce	v	v	v
ACT! 2007 or later (Standard/ Premium for Workgroups)	v	v	ACT! 2009 or later
Goldmine v6.50	v		
Time & Chaos	v	v	v
CSV (Comma Separated Text File)	v	v	v
Image (Jpg)	v	v	v
Microsoft Access File	v	v	v
Microsoft Excel File	v	v	v
Microsoft Windows Contacts		v	v
Text File	v	v	v
VCARD File	v	v	v
WorldCard File (v6.0 or later)	v	v	v
WorldCard Exchange File (.wxf)	v	v	v

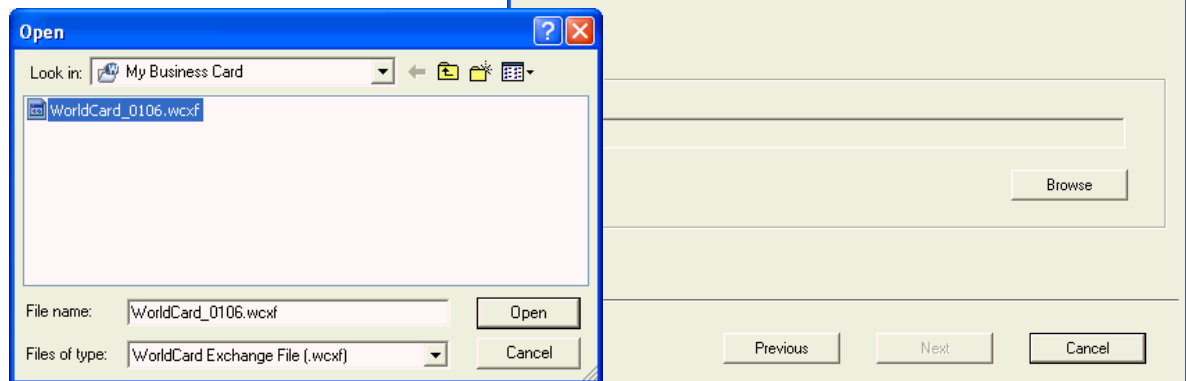
5.3.2 Import

The new data exchanging function in WorldCard allows you to import contacts from another WorldCard series product, such as **WorldCard Mobile for iPhone** or **WorldCard Contacts for iPhone**. WorldCard will import the **.wxf** file, which is compatible with all WorldCard Series products.

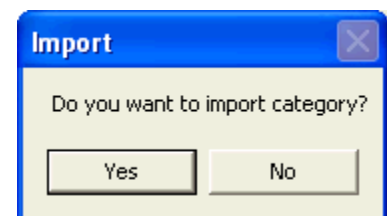
1. Click **Import** on the **File** menu. The **Import Wizard** dialog box appears. Select **WorldCard Exchanged File**.



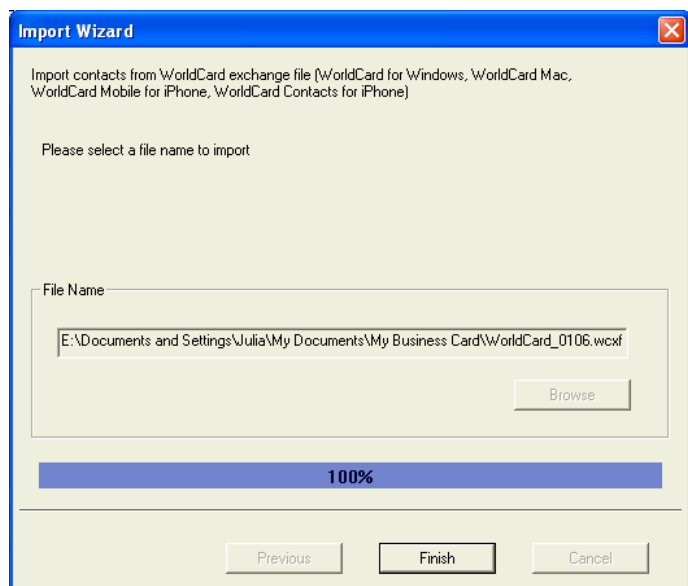
2. Click **Browse** to select a .wcf file in your computer and click **Next** to continue the importing process



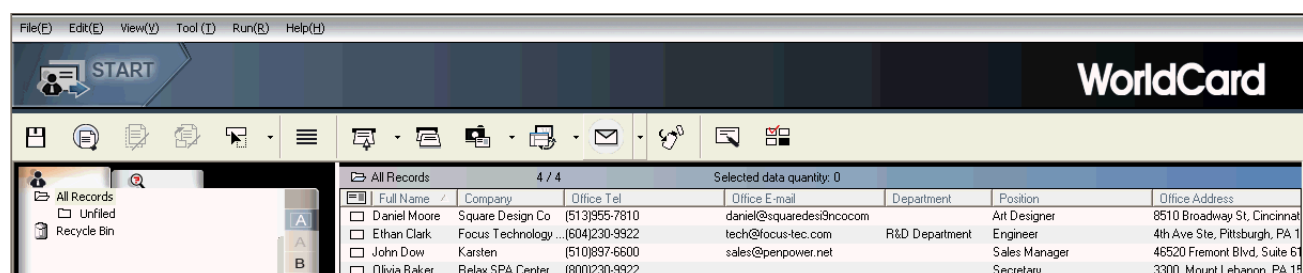
3. A note window will appear to ask whether you want to import category or not. Click **Yes** to import categories or vice versa.



4. Please click **Finish** to complete the importing process.



5. The new contacts should appear in the **Browse** pane.



WorldCard Import

Import contact data from the following products to WorldCard:

Item	Windows XP	Windows 7/ Vista 32	Windows 7/ Vista 64
Lotus Notes v6.5-v8.5	v	v	v
Microsoft Outlook	v	v	v
Microsoft Outlook Express	v		
Microsoft Pocket PC Contacts (v3.x, v4.x and Mobile 5, 6)	v	v	
Palm Desktop v4.1.2 or later	v	v	v
Salesforce	v	v	v
ACT! 2007 or later (Standard/ Premium for Workgroups)	v	v	ACT! 2009 or later
Goldmine v6.50	v		
Time & Chaos	v	v	v
CSV (Comma Separated Text File)	v	v	v
VCard File	v	v	v
WorldCard File (v5.0 or later)	v	v	v
WorldCard Exchange File (.wcf)	v	v	v

5.3.3 Sync

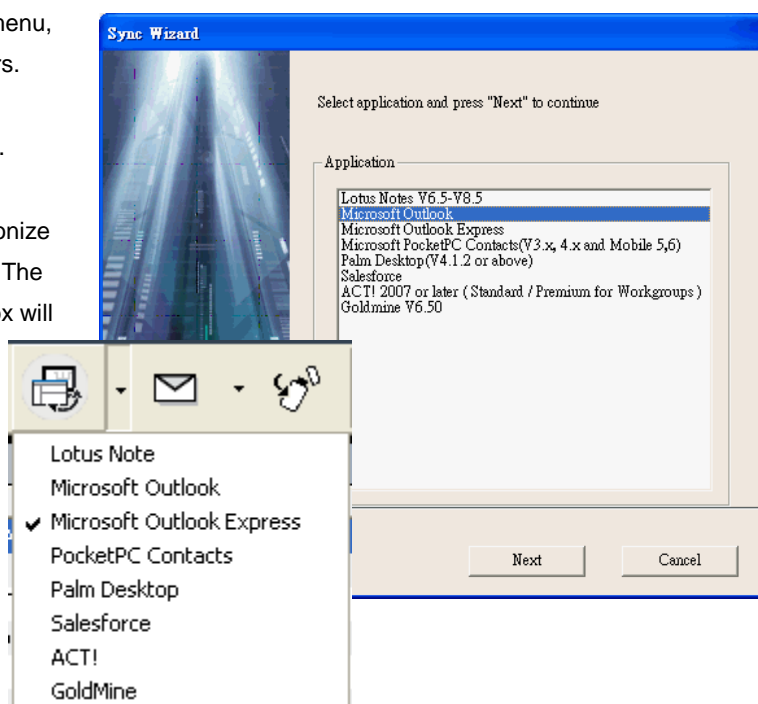
The **WorldCard Synchronize** function allows you to synchronize the data between **WorldCard** and other applications such as Microsoft Outlook Express, Microsoft Outlook, Lotus Notes, PocketPC Contacts, Palm Desktop, ACT! by Sage, Goldmine and Salesforce(Contacts).

1. To use the **Synchronize** function, on the **File** menu, click **Sync**. The **Sync Wizard** dialog box appears.

For the supported software, please refer **5.9.4**

WorldCard Data Exchange Compatibility List.

2. Select the application that you desire to synchronize with your WorldCard database by clicking **Next**. The **Sync Wizard Status and Information** dialog box will open. At the same time WorldCard will begin to synchronize with the selected application.



Note: If you are synchronizing with Outlook Express and there are contacts whose name fields are empty, a message dialogue will pop up to warn you that those contacts will not be synched with. If you agree with it, then you can click **Yes** to continue the synchronization.

- While synchronization occurs, a blue progress bar displays. Once the process is completed, the **Sync Wizard** window will display **Status** and **Information** data about the records you have synchronize. In the **Status** pane you can see that there is a difference between the Microsoft Outlook database and the **WorldCard** database. The **Information** pane shows all actions that have been completed at this point.
- You can view the complete details of the actions that will be taken to synchronize the two databases from the **Details** dialog box. To view the **Details** dialog box, click **Detail**. The **Details** dialog box appears. From the **Details** dialog box, you can click **Select all data** to accept all data in the list as acceptable changes.

The **Sync Wizard** window displays the following data:

	Microsoft Outlook Express	WorldCard
Add	0	0
Change	2	0
Delete	9	0

Information pane content:

- Check WorldCard, Finished 55
- Check Microsoft Outlook Express, Finished 64
- Read WorldCard, Finished 2
- Read Microsoft Outlook Express, Finished 11

Buttons: **Accept**, **Exit**

For this item, the Sync function would **DELETE** the entry from Microsoft Outlook. Alternatively, you can use the **Select none data** icon to clear the selection of all items in the list. After reviewing the **Detail** list, you may close the **Detail** window by clicking **OK**.

The **Details** dialog box displays the following table:


	Full Name	First Name	Middle Name	Last Name	Company	Position
<input checked="" type="checkbox"/> Update To Microsoft Outlook Express	David A. Faudman	David A.		Faudman	CleanOffer.com	CEO
<input checked="" type="checkbox"/> Update To Microsoft Outlook Express	Adrian S. Windsor	Adrian S.		Windsor	Commercial. Resident	Ph.D.
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	Bruce Glaser	Bruce		Glaser	Exchange Resources	1031 E
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	David Cathcart	David		Cathcart	RaineHorne	Genero
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	Dennis Palmer	Dennis		Palmer	AMERIDREAM	Indepe
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	Eric Lee	Eric		Lee	Prudential	REALT
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	Ike Sutton	Ike		Sutton	EXUS NETWORKS.	Preside
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	Jasper de Guzman	Jasper de		Guzman	Office DEPO	Consul
<input checked="" type="checkbox"/> Delete Microsoft Outlook Express	Jeff Bare	Jeff		Bare		Senior

Buttons: **Select all data**, **Select none data**, **OK**

- To accept the actions required to synchronize the two databases, click **Accept**. The **Details** dialog box will display the updated **Status** and **Information** panes. To close the dialog box and complete the Sync process, click **Exit**.

5.4 Settings

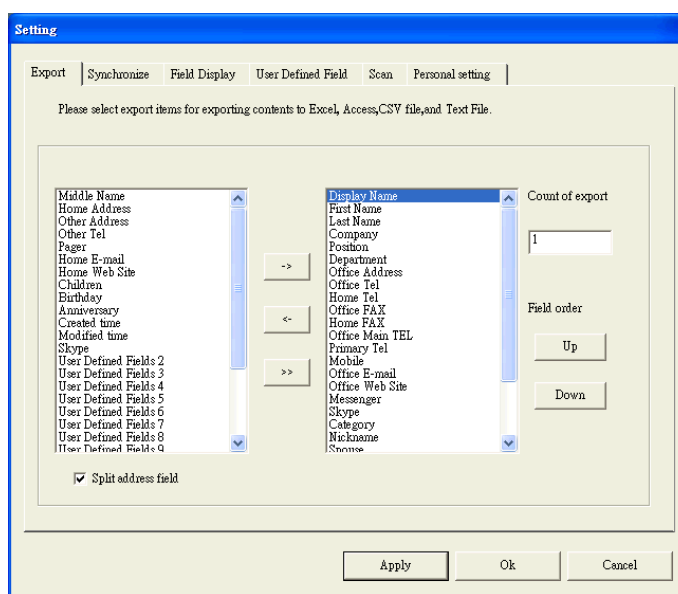
WorldCard has many selectable **Setting** options to allow you to configure the operational functions of **Export**, **Synchronize**, **Field Display**, **User Define Field**, **Scan** and **Personal setting** options. To set your WorldCard options, use the procedures outlined in this chapter.

On the **Tool** menu, point to **Setting** and click any of the options. Alternatively, on the main toolbar click the **Setting** button  .

5.4.1 Export Option

To configure the **Export** options, open the **Setting** dialog box page as described in the preceding section of this chapter.

The **Setting Export** dialog box displays with ALL options selected as a default configuration. The fields on the right will be exported to Excel, Access, CSV files and Text file. To add another field, select a field from the left side and click the **[>]** button. Click **[>>]** button to export all fields. You can set the number of fields with the same name to export (up to 10).

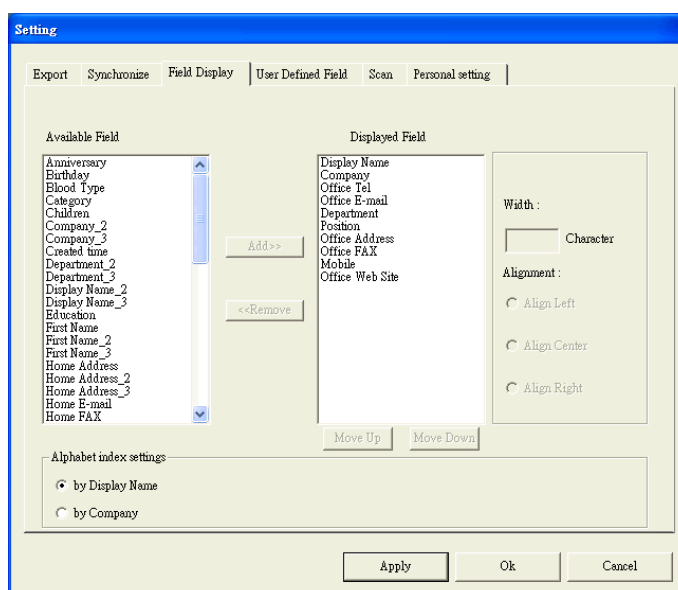


Select **Split address field** to export address detail to different fields. After you've selected the options you want, click **OK** to accept the changes.

5.4.3 Field Display

To set the **Field Display** options of the List Mode and Duel mode, open the **Setting** dialog box as described in the preceding section of this chapter.

The **Field Display** tab of the **Setting** dialog box appears with a default configuration as displayed in the above window. To modify the selected options, click any available field from the **Available Field** menu on the left side of the dialog box. After a field is selected, click **Add** to add it to the **Displayed Field** list. The selected field will be added to the applicable **WorldCard** screens.



To remove a field, click the desired field in the **Displayed Field** list. Then click **Remove** to delete the field from your WorldCard screen views. You may also set field options from the available options on the right side of the **Field Display** window. Once you have completed your changes, click **Apply** to apply any changes.

The **Alphabet index** can be indexed **by Display Name** or **by Company**. Please refer to **Chapter 3.1**.

5.4.5 Scan Option

To configure the **Scan** options, open the **Setting** dialog box as described in the preceding section of this chapter.

The **Scan** tab displays the default configuration as seen in the preceding picture. You may define **Card Style**, **Language**, **Chinese character** options and Scanning method.

Check **Capitalize the first letter of name** to recognize the first letter of the contact's name to a capital letter. The other letters of the name will be recognized to lowercase letters.

Click **Apply** for the settings to take effect.

The screenshot shows the 'Setting' dialog box with the 'Scan' tab selected. The dialog has a title bar 'Setting' and several tabs: 'Export', 'Synchronize', 'Field Display', 'User Defined Field', 'Scan', and 'Personal setting'. The 'Scan' tab is active and contains the following settings:

- Card Style:** Two radio buttons, 'Single-sided' (selected) and 'Double-sided'.
- Language:** Two dropdown menus, 'Front Side' and 'Back Side', both set to 'English'.
- Chinese character option:** A dropdown menu 'Output character' set to 'Traditional Chinese' and an unchecked checkbox 'Recognize Hong Kong characters'.
- Name display:** A checked checkbox 'Capitalize the first letter of name'.

At the bottom of the dialog are three buttons: 'Apply', 'Ok', and 'Cancel'.